

Statement of Work

I. Title: Support for EPA's State Climate and Energy Program
Contractor Name: ICF International
Contract #: EP-W-12-010
POP: April 1, 2016 - March 31, 2017
WA #: 4-47

II. Work Assignment Manager (WAM):

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Alt. WAM Name: Julia Miller
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III. Background:

The mission of the Environmental Protection Agency's Climate Protection Partnerships Division (CPPD) is to reduce emissions of greenhouse gases (GHGs) that contribute to climate change. CPPD forges partnerships with private and public organizations to accomplish this goal through the promotion of cost-effective energy-efficient technologies and renewable energy. CPPD delivers the technical information and tools that organizations and consumers need to choose renewable and energy efficient solutions and best management practices. The Division's success is dependent in part on the information management infrastructure which tracks these partnerships, and collects and disseminates information to the public.

A key CPPD program is the State and Local Climate and Energy Program run by the State and Local Branch (SLB). This program provides technical assistance, analytical tools, and peer exchange opportunities to help state, local, and tribal governments use energy efficiency, renewable energy and other strategies to reduce GHG emissions and achieve multiple environmental, human health, energy system and economic benefits. This program also runs EPA's Climate Showcase Communities; 50 local and tribal pilot projects developing cost-effective and replicable models of GHG reductions. In addition, SLB's Heat Island Reduction Program works with communities, states, public officials, industry representatives, researchers, and others to identify opportunities for implementation of heat island reduction strategies. The purpose of this work assignment is to advance the development of key program resources and tools and to provide technical assistance and program support for SLB's work primarily on state issues.

The Contractor shall submit for review and obtain approval from the EPA Work Assignment Manager (WAM) prior to use or dissemination of any and all materials produced under this work assignment, such as manuals, technical documents, and outreach materials.

IV. Description and Tasks:

Task #1: Work Assignment Administration

The Contractor shall meet with the Work Assignment Manager (WAM) to discuss the WA tasks and deliverables. This meeting can be via teleconference. The Contractor shall then prepare and submit a work plan and cost estimate for the WA consisting of project plans and budget estimates itemized for each task. The budget estimates should include breakdowns of elements by cost, professional level, subcontractors, and other direct costs. Work may begin on all tasks during preparation of the work plan, if directed by the WAM.

The Contractor shall participate in administrative meetings and/or conference calls at the written request of the WAM. The technical work of each task will be directed by the WAM. The Contractor shall participate in meetings and/or conferences calls at the written request of the WAM. The WAM will determine the date and location of these meetings.

Task #2: Increase State Understanding on EPA Power Sector Rules and the Opportunities for Energy Efficiency and Renewable Energy, and Related Issues

The Contractor shall provide logistical and technical support to EPA in organizing and facilitating six webcasts, as well as related materials. It is expected that approximately 150-250 participants (of the total roster) will participate on each webinar and each webinar will last 1.5 hours. For this task the Contractor shall:

- Assist EPA with logistics and facilitation for approximately six webinars;
- Maintain a website with relevant materials (ongoing);
- Work with EPA to promote the webinars;
- Distribute related presentation materials and other relevant information to the webinar participants; and
- Maintain a distribution list.

Task #3: Gather State Feedback on Regulatory Design Issues, Where Appropriate

The Contractor shall compile and synthesize feedback from meetings, written comments, reports and other avenues, as appropriate, to summarize state concerns and recommendations on regulatory issues that relate to energy efficiency and renewable energy, and other topics as identified.

Task #4: Assist SLB with the Design of Tools and Resources that States Can Use to Meet EPA Regulations and Standards

The Contractor shall assist SLB in designing and refining a toolbox of models, tools, guidance and other resources that provide states with the information they need to effectively use energy efficiency and renewable energy to help them meet EPA regulations and standards. The Contractor shall also assist SLB in determining the best venue and approach for housing this information.

Task #5: Provide Support for Policy Tracking and Advancing Benefits Quantification through Analyses, Materials and Tools

Building off of policy tracking, analysis, research, tools and benefits outreach strategy work conducted by the Contractor under Contract EP-W-09-003 and Work Assignment 3-37 under this Contract, the Contractor shall support SLB's effort to promote and integrate understanding on state climate change, energy efficiency and renewable energy policies, opportunities and experiences as well as the validation and/or estimation of energy, air and economic benefits into the design and implementation of climate change mitigation, energy efficiency and renewable energy policies, programs and measures.

Under Contract EP-W-09-003 and Work Assignment 3-37 of the current contract, the Contractor tracked benefits information, including stories where jobs have been created that support clean energy. EPA shares these stories with states via our weekly newsletters. The Contractor shall continue to track these stories and submit in the agreed upon format, 2-3 new stories via email each week to the WAM. The Contractor shall maintain a master compilation of all the stories collected so far, making additions, deletions and edits as new information becomes available.

Additional support may be requested by the WAM through specific technical direction and shall include but not be limited to:

- Researching, tracking, analyzing and documenting the status, design, compliance mechanisms and impacts, including energy, economic and/or greenhouse gas emission impacts, of state clean energy and climate change policies across all states.
 - The EPA WAM will select the policies.
 - Products may include but not be limited to: a spreadsheet cataloguing data collected, summary factsheets, memoranda and summaries of any targeted analyses requested.
- Developing and maintaining in-reach and outreach materials, including state-specific factsheets, to:
 - Increase understanding on the implications and multiple benefits, both qualitative and quantitative, of implementing various climate, energy efficiency and/or renewable energy policies, measures and programs;
 - Raise awareness of the best practices for implementing policies and quantifying benefits, including the utilization of SLB tools and identifying/using responsibly rules-of-thumb multipliers; and

- Enhance communications by EPA and states on the benefits of and approaches to implementation of clean energy.
- Organizing, developing and/or promoting success stories or case studies to be included in EPA's case study portal and/or website.
- Providing training and/or training materials on SLB-supported tools.
- Developing new or adapting existing tools to enhance states' and locals' ability to easily quantify impacts of energy efficiency and renewable energy actions.
- Tracking and compiling stakeholder feedback on climate change-related regulatory options proposed or released by EPA.

Product and/or tool development may require working with and/or leveraging the expertise of analysts and NGOs that support state and local functions, and other targeted groups or experts as specified by the WAM in the technical direction.

Task #6: Provide Support for and Update the Greenhouse Gas Equivalency Calculator

The Contractor shall provide support to the EPA WAM for the Greenhouse Gas Equivalency Calculator which includes but is not limited to: drafting of responses to questions that come in from users, correcting any errors or problems identified within the calculator, tracking changes to emissions factors used within the calculator and alerting EPA WAM when new factors are available; researching and drafting a list of potential updates to and any new equivalencies for the calculator for EPA peer review and coordinating with EPA's web team to ensure updates and corrections are made appropriately.

Task #7: Provide Support for Developing and/or Updating EPA's Policy and Analysis-related Publications Documents

Upon technical direction from the EPA WAM, the Contractor shall support SLB's effort to update key program resources, including the Assessing the Multiple Benefits of Clean Energy: A Resource for States. For the Multiple Benefits guide, the Contractor shall conduct research as directed and/or make text revisions as requested. The Contractor shall reformat the chapters into a Word format. The Contractor shall also update URL links throughout the document and repaginate it accordingly. Additional technical direction to update other resources may be issued.

The Contractor shall set up a call with the EPA WAM to discuss the substance, outline and timeline for any projects.

Task #8: Support the Development of an EM&V Guidance for EPA's 111(d) Proposal

This Task provides Contractor support to assist EPA with the finalization of Evaluation, Measurement, and Verification (EM&V) Guidance and "presumptively approvable" provisions under the Clean Power Plan (CPP). The draft EM&V guidance is here: http://www.epa.gov/sites/production/files/2015-08/documents/cpp_emv_guidance_for_demand-side_ee_-_080315.pdf. The proposed federal plan and model rules (FP/MR) are located here: <https://www.gpo.gov/fdsys/pkg/FR-2015-10-23/pdf/2015-22848.pdf>. The relevant EM&V

portions of this document are included in Section IV.D.8. Task #19 consists of the following Contractor actions:

- Subtask 1: Project Management
 - Convene a team of technical experts to finalize EPA’s EM&V Guidance and FP/MRE provisions under the CPP
 - Schedule and participate in hour-long weekly meetings
 - Summarize meetings and provide weekly status updates
 - Initiate additional team communications as need to ensure that technical experts know their responsibilities and deadlines
- Subtask 2: Research, Information Gathering, and Decision Support
 - Summarize, by topic and commenter, the applicable stakeholder comments received on the EM&V guidance and FP/MR
 - For budgeting, assume 45 sets of comments on the guidance and 45 on the FP/MR
 - Conduct research, participate in technical discussions, and take all other actions necessary to identify options and approaches for how key EM&V topics should be handled in the final EM&V guidance and FP/MR provisions
 - For budgeting, assume research and writing of 1-page summaries on twelve technical topics, per the topics addressed in chapter 2 of the draft guidance
- Subtask 3: Guidance Editing
 - Leverage decisions on chapter 2 topics (per above) to suggest edits to each of the chapters and appendices in the draft EM&V guidance
 - Provide for two rounds of substantive editing of draft EM&V guidance
 - Provide for two rounds of technical editing of draft EM&V guidance
 - For budgeting, draft guidance is about 75 pages
- Subtask 5: Outreach and Capacity Building
 - Support outreach and capacity building on EM&V Guidance by developing materials and presentations that describe EPA’s approach
 - For budgeting, assume assistance is needed to plan and coordinate three webinars, write three presentations (15 slides each), and develop three summary documents describing EPA’s EM&V approach (3 pages each)

V. QA Requirements:

Not applicable.

VI. Deliverables:

At the request of the WAM, the Contractor shall provide an interim draft deliverable as each major milestone is reached. Milestones may include: developing an outline, creating a first draft, revising the draft based on EPA/expert comments, and producing a copy edited and print-/web-ready final draft. The Contractor shall respond within two weeks to comments from the WAM on any interim draft deliverable, unless otherwise specified in the table below or through technical direction.

The Contractor shall adhere to the following schedule:

Task	Deliverable	Delivery Schedule
1	Work Plan	20 days after the effective date of the WA
2(a)	Call to discuss webinar plan and schedule for the year	April 2016
2 (b)	Hold up to six webinars	Per schedule under 2(a)
3 (a)	Summaries of comments from key stakeholders, as identified by EPA	As requested
3 (b)	Draft replies to stakeholder comments	As requested
4	Updated toolbox website	July 2016
5(a)	2-3 jobs articles and an updated archive of all stories added, deleted or updated to date	Friday of each week
5(b)	50 state climate and energy factsheets	TBD, as requested by WAM
5(c)	Upon technical direction of WAM, call to discuss the format of needed product(s) and the timeline for completing the task	Within 1 week of receipt of technical direction from WAM
5(d)	Draft product(s) in the format requested under 13(c)	TBD, under 13 (c)
5(d)	Final product	Within 2 weeks of receipt of comments from WAM
6(a)	Upon receipt of EPA GHG Equivalency Calculator questions, draft response for addressing question(s)	Within 5 days of receipt of question/problem related to the calculator from WAM
6(b)	List of recommended updates or additions to the EPA GHG Equivalency Calculator	TBD, as requested by WAM
6(c)	Upon technical direction, revised calculator in a format that can be posted by EPA's web team	Within 14 days of WAM approval of proposed updates/changes
7(a)	Kickoff call with WAM to discuss updates to resources	Within 5 days of start of work on task
7(b)	Summary of kickoff call held in 15(a)	TBD
7(c)	Drafts of the individual chapters and any other materials agreed to during kickoff call, as documented in 15(b)	TBD
7(d)	Revised materials	Within 7 days of receipt of comments from WAM
8(a)	Summary of comments	Within 3 weeks of start of work on task

8 (b)	Suggested edits to guidance	TBD, as requested by WAM
8(c)	Materials and presentations that describe EPA's proposed EM&V approach	TBD, as requested by WAM

VII. Reporting Requirements:

The Contractor shall provide monthly progress reports, itemized by task, in accordance with the terms of the contract. These reports shall include hours and dollars spent by task, as well as a description of the work completed and deliverables produced. The Contractor shall provide written notification to the WAM within 30 days of when it anticipates expending 75 percent of the budgeted labor hours and/or budget dollars in the approved work plan. The Contractor shall submit work products in electronic as well as hard copy form. In addition, the Contractor shall deliver to the WAM each draft and final report in electronic format that is readable by windows-based word-processing (Microsoft Word 2013), graphics (Microsoft PowerPoint 2013), spreadsheet (Excel 2013), and database (Access 2013) programs. The Contractor shall also provide electronic copies of reports in PDF format.